

6 Post

6.1 Introduction

On 1 October 2011, Ofcom took over regulation of the UK’s postal services from the previous regulator Postcomm. Ofcom is responsible for safeguarding the UK’s Universal Service Obligation on postal services¹³.

This section of the report summarises the results of a face-to-face survey of UK residential consumers conducted in December 2011. In total 3615 UK adults with responsibility for their household’s post were interviewed, including 95 in Northern Ireland¹⁴.

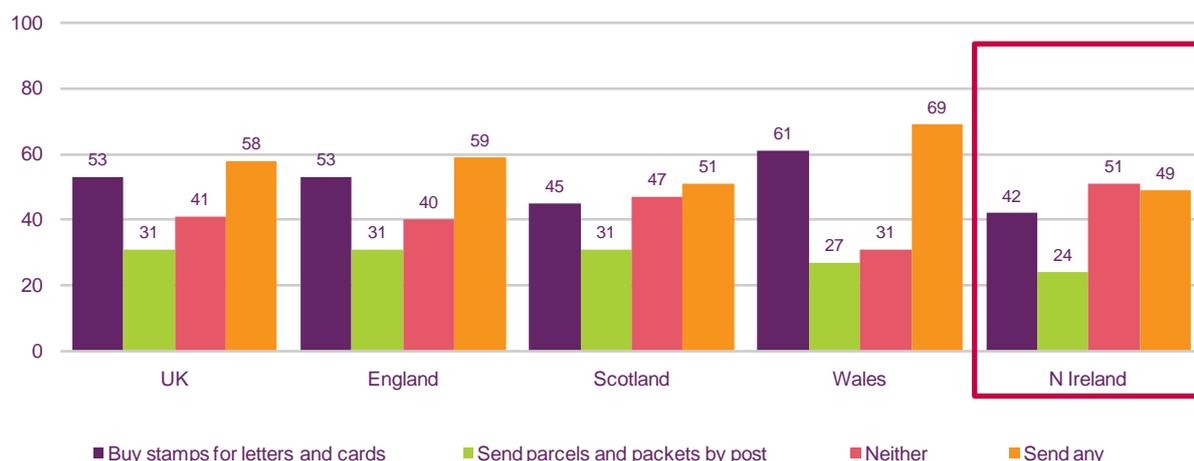
Ofcom is currently conducting further research among users of the postal service in Northern Ireland, using a larger sample of residential users including those in remote rural locations, as well as business users of postal services,.

6.2 Sending and receiving post in Northern Ireland

Consumers in Northern Ireland claim to send less post regularly than in other nations.

Fewer consumers in Northern Ireland (49%) claim to send items of post ‘regularly’ than the UK average (58%). As might be expected, fewer consumers in Northern Ireland (42%) claim to ‘regularly’ buy stamps for letters and cards than the UK average (53%). The number of consumers claiming to ‘regularly’ send parcels and packets (24%) is also lower than in other nations, and lower than the UK average of 31%. (Figure 6.1) But the term ‘regularly’ is self-defined in this question, while Figure 6.2 shows the actual numbers of letter/cards claimed to be sent, which is similar to the UK average.

Figure 6.1 Regular use of postage stamps and postage services by nation



Source: Ofcom Attitudes toward spending research, 2012

Base: All adults aged 16+ (n=2124 UK, 1726 England, 182 Scotland, 99 Wales, 117 Northern Ireland)

Q: Do you or anyone in your household regularly do any of the following...

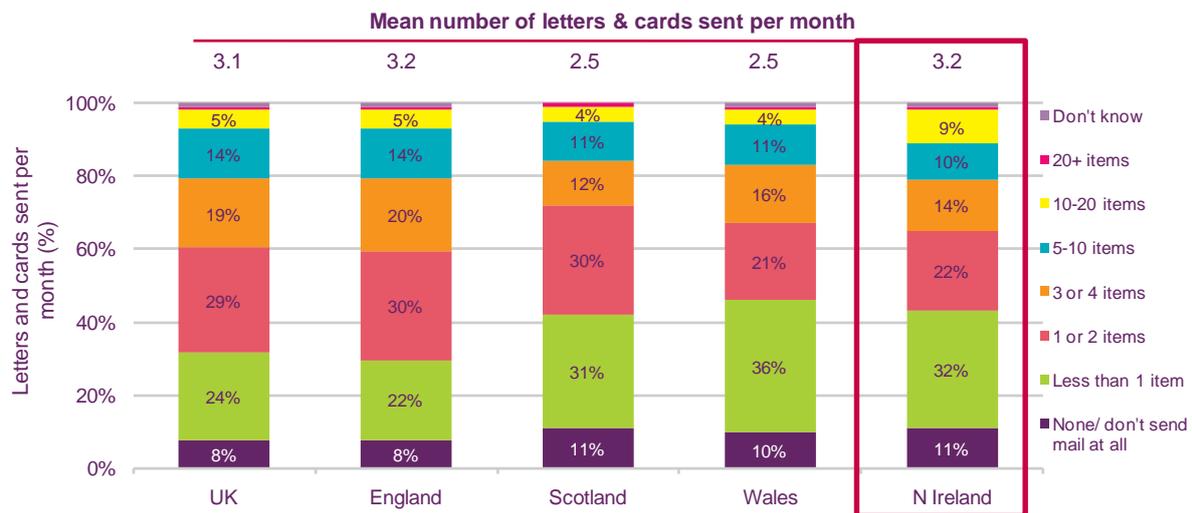
¹³ More information about Ofcom’s regulation of postal services in the UK can be found here: <http://stakeholders.ofcom.org.uk/post/>

¹⁴ The base size for consumers in Northern Ireland is relatively small, therefore caution should be used when interpreting and applying the results

People in Northern Ireland receive more post than they send

Adults claim to send an average of 3.2 letters or cards in an average month (Figure 6.2), compared to an average of approximately 6.4 letters and cards received per week (Figure 6.3). This difference is explained by the fact that the majority of UK mail is sent by businesses to households.

Figure 6.2 Approximate number of letters and cards sent per month – personal mail



Source: Ofcom omnibus research, December 2011

Base: All adults aged 16+ with responsibility for post (n = 3615 UK, 3115 England, 232 Scotland, 173 Wales, 95 Northern Ireland)

Q. Approximately how many letters and cards, do you personally send in an average month? This should exclude any items you send from home in connection with running a business, if you do this from home. We will ask about parcels separately

Adults in Northern Ireland receive fewer letters and cards than adults in the other nations

The volume of letters and cards sent by adults in Northern Ireland is similar to the UK average of 3.1 items sent per month. (Figure 6.2) The number of letters and cards received per week appears to be lower than the UK average of 8.7 per week, as adults in Northern Ireland in our survey claimed to receive fewer items. This difference is statistically significant; although the extent of the difference might be explained by survey error margins. Research undertaken by Royal Mail has also found that households in Northern Ireland receive fewer items on average than those living in the UK as a whole. Later this year Ofcom will be conducting research among a much larger sample of adults in Northern Ireland, which will enable us to examine this difference with greater confidence.

Figure 6.3 Approximate number of letters and cards received per week



Source: Ofcom omnibus research, December 2011
 Base: All adults aged 16+ with responsibility for post (n = 3615 UK, 3115 England, 232 Scotland, 173 Wales, 95 Northern Ireland)
 Q. Approximately how many letters or cards do you receive in an average week? Please don't include parcels, we will ask you about these separately.

Consumers in Northern Ireland receive an average of 1.2 parcels per month

Across the UK, in recent years, the volume of parcels delivered to households has been increasing as consumers have ordered more items online for delivery to their homes. In Northern Ireland, adults claim to receive, on average, 1.2 parcels per month. However, the number of packages received varies considerably, with a substantial minority (11%) receiving three or more parcels per month (Figure 6.4). The data suggest that adults in Northern Ireland receive a similar number of parcels to the UK average.

Figure 6.4 Approximate number of parcels received per month – personal mail



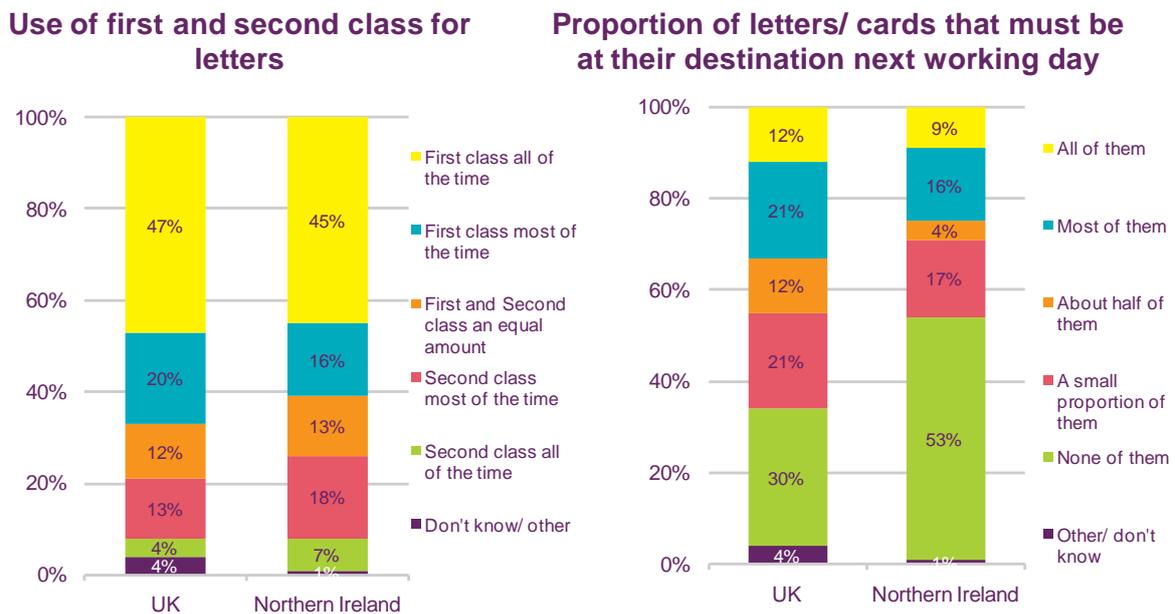
Source: Ofcom omnibus research, December 2011
 Base: All adults aged 16+ with responsibility for post (n = 3615 UK, 3115 England, 232 Scotland, 173 Wales, 95 Northern Ireland)
 Q. Approximately how many parcels do you receive in an average month?

6.3 Use of stamps in Northern Ireland

More than four in ten people in Northern Ireland always use First Class stamps to send post

Six in ten (61%) post users in Northern Ireland said that they use First Class stamps more than Second Class stamps and 45% said that they use First Class all the time. This is despite the fact that only a minority say their mail has to arrive the next day, with 9% saying that all of their mail needs to arrive next day, and 16% saying that most of it does. Whereas three in ten (30%) of consumers in the UK overall said that none their mail needed to arrive the next working day, around half (53%) of consumers in Northern Ireland said this was the case.

Figure 6.5 Use of First and Second class post



Source: Ofcom omnibus research, December 2011

Base: All adults aged 16+ with responsibility for post in Northern Ireland (n = 95)

Q. When sending letters/ cards which do you use? And what proportion of these letters/ cards have to be at their destination the next working day?

6.4 Attitudes towards the postal service in Northern Ireland

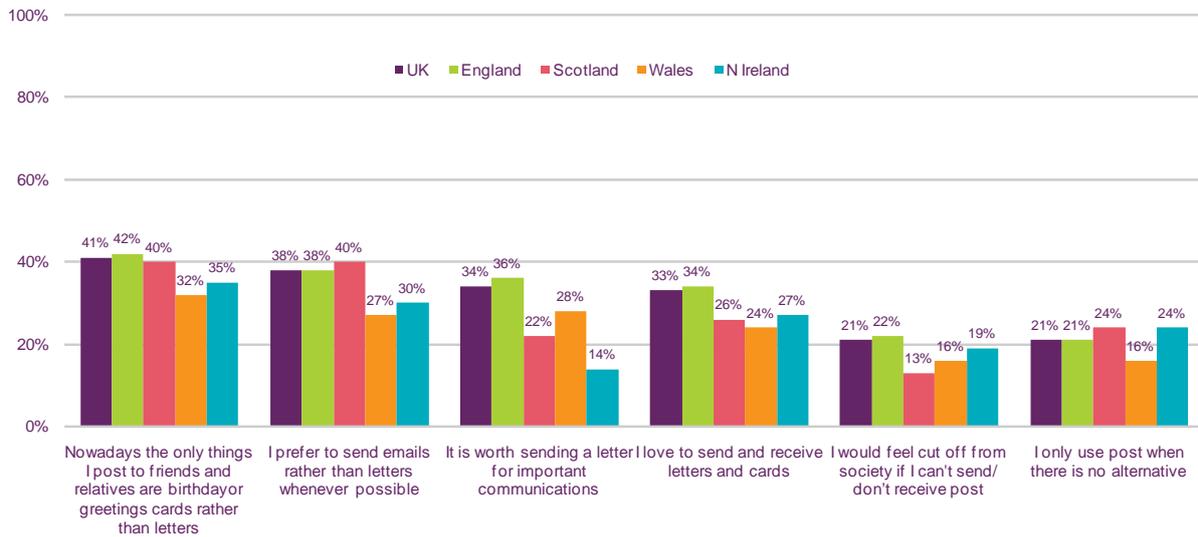
Adults in Northern Ireland are less likely to say that it is worth using post for important communications

Fourteen per cent of adults in Northern Ireland agree that it is worth using post for important communications, the lowest across all UK nations and significantly lower than the UK average (34%).

Three in ten (30%) adults in Northern Ireland agree that they prefer to send emails rather than letters whenever possible, which is a lower proportion than agree with this across the UK (38%). A quarter (24%) of adults in Northern Ireland say that they use post only when there is no alternative, compared to the UK average of 21% (Figure 6.6) – this is the joint highest level of agreement with this statement across the UK.

Adults in Northern Ireland are less likely to agree that they love to send and receive letters and cards (27% compared to the UK average of 33%). One in five (19%) agree that they would feel cut off from society if they could not send or receive post.

Figure 6.6 Agreement with statements about post



Source: Ofcom omnibus research, December 2011

Base: All adults aged 16+ with responsibility for post (n = 3615 UK, 3115 England, 232 Scotland, 173 Wales, 95 Northern Ireland)

Q. Which of these statements applies to you?